FIN200 v2.6a User Guide

All fields outlined in red must be completed. If any field outlined in red is left blank, you will not be able to submit the form. 'Not Applicable', N/A or other forms of this abbreviation are not acceptable responses in any of the fields.

Due to the cost of processing invoice requests and their subsequent payments it is not financially viable to raise and invoice for less than £50. Any requests for an invoice to be raised for less than £50 will be returned to you and you will be need to arrange for payment by another mechanism.

Your details:
This section will normally be completed with the details of the person who is completing the form. If we have any queries regarding the invoice request, they will be directed to this person. The invoice copies and reports will be sent to this person by email.

Send attachments with invoice:
Please tick yes or no. If there are attachments you would like us to send with the invoice, they can be submitted to us by one of the following methods:
- attach it to an email along with the invoice request and send it to cirmsinvoicerequests@contacts.bham.ac.uk
- after you have submitted an invoice request, reply to the confirmation email, including the attachment in your reply, which will then be logged against your request in our system.

Special Requests:
Please enter any special requests here, e.g. if the invoice need to be emailed to the customer.

Customer's details:
You will need to select the customer type, this will then only allow you to fill in fields relevant to that customer type. For example, if you select "Individual" the fields for FAO, VAT registration, Purchase Order No. and Charity No. will auto complete with Individual, and you will not be able to overtype this text.
We need to have a full postal address, telephone number and email address for the customer. For large companies, this would ideally be their Finance Department.

VAT Number:
If you are invoicing an organisation, you will need to give us their VAT number. If the VAT number provided is invalid, the form will be rejected.
If the organisation does not have a VAT number, please type the reason into the VAT Registration field, e.g. if it is a charity, enter Charity, and then complete the Charity No field.

Accounts to be credited:
Each line must be fully completed, as the system cannot process incomplete lines. If you miss out one of the fields, the form will be rejected.

The Element 3 field is limited to 7 characters - this should be 3 letters followed by 4 numbers. Invoices for research accounts cannot be raised as sales invoices. Please contact your Research Accountant if you need to raise an invoice using research codes.

The Line Description field is limited to 100 characters, as this reflects the number of characters we can input onto the invoice per line. If you have additional information that you cannot fit within these limits, please enter them in the special requests field with a note that the information must be printed on the invoice.

Your form will be automatically validated on receipt by our system, and will be rejected if an invalid response is entered in certain fields. You will receive an email advising you of the reasons your invoice has been rejected, and will need to correct this and then resubmit your invoice. Once your form has been received and accepted into our system, you will receive a confirmation email with a unique reference. This reference will help us to track your invoice through our system, and so should be quoted in all correspondence. We highly recommend that you keep copies of the emails you receive regarding your invoice request submissions, as this will help us to resolve any queries.

Please Note - once a form has been submitted, the 'Submit' button will disappear from the form. This is to prevent submitting multiple copies to the system and creating unwanted duplicates. We recommend that all users save a copy of the form **before submitting** – this will allow a new copy to be easily edited and sent again if required.